Market Study on Tourism, Hotel and Restaurant Equipment in Mexico.

This market guide booklet has been prepared with the problems inherent to the initiating exporter in mind. However it is not exhaustive; individual circumstances, interest and needs will dictate how companies should tailor their approach and strategy to the Mexican market. While every attempt has been made to ensure accuracy in this study, no responsibility can be accepted for errors or omissions.

Further assistance can be obtained by addressing requests directly to the Commercial Division of the Canadian Embassy in Mexico City located at Calle Schiller No. 529, Colonia Polanco, 11560 México, D.F. Telephone 254-32-88, telex 177 1191 and fax (sending from Canada) 011 (525) 545-17-69; or the Latin American Division Department of External Affairs, Industry Science and Technology Canada, 125 Sussex Drive, Ottawa, Ontario K1A 0G2, Phone 9950460 Fax (613) 996-06-77.

MARKET STUDY ON HOTEL AND RESTAURANT EQUIPMENT AND SUPPLIES IN MEXICO

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1. BACKGROUND

Mexico is a country with close to 7,000 miles of coastlines, important archaeological sites, a great variety of museums, recreational sport centers and vacation resorts. The Mexican Government considers tourism one of its highest priorities since it creates a large number of jobs and generates foreign income in excess of $2.5 billion dollars annually, making it the second most valuable earner of foreign exchange.

Mexico had its first tourism surplus in 1945. Between 1946 and 1952 Mexico's tourism infrastructure grew to become one of the world's most important, through the development of roads, airports, new air routes to the U.S. and within the country, and through financial support to build hotels and restaurants. Major efforts were made to make Acapulco a competitive tourism resort. As early as in 1954, some of the most prominent resorts were identified, such as the Caribbean and the coasts of Jalisco, although it was to be many years later that these were to be developed. The first tourism plan was proposed in 1962 in order to promote a nationwide orderly development of the industry. Between 1966 and 1968, tourism was planned more thoroughly, identifying the potential areas of the Caribbean, Ixtapa, Los Cabos, Loreto and Huatulco for their gradual development.

The Tourism Infrastructure Promotion Fund INFRATUR (Fondo de Promoción de Infraestructura Turística) was created in 1969 to develop new tourism destinations. The National Trust Fund for Tourism Development (FONATUR) was created in 1973, and in 1974 the Tourism department was transformed into the Secretariat for Tourism (SECTUR). New tourism destinations began to flourish, such as the Caribbean (Cancún, Cozumel and Isla Mujeres), the Pacific coast (Ixtapa-Zihuatanejo and Manzanillo) and Baja California (Cabo San Lucas, San José del Cabo and La Paz) and the Acapulco convention center was built in 1973. A series of trusteeships were created to develop and build in certain areas, such as the states of Guerrero (Acapulco and Zihuatanejo), Nayarit (Bahía de Banderas), Jalisco (Puerto Vallarta), Quintana Roo (Xel-Ha and the Caribbean), Morelos (Tequesquitengo), Oaxaca (Puerto Escondido) and Baja California (La Paz and Cabo San Lucas).

However, it was not until 1979 that a series of efforts were made to reorganize the official tourism sector around the Federal Tourism Law, which properly regulated matters related to tourism areas, demand and supply, and which properly defined the functions of FONATUR. The National Tourism Plan came into effect, which defined the objectives and short and long term targets regarding tourism on a national and regional basis. In 1986, the extraordinary tourism resort of Cancún was created from a small fisherman's village and the basis was set for a similar development in Huatulco, on the coasts of Oaxaca. Tourism is now Mexico's top dollar earner after oil and is a huge revenue-generating industry that constantly grows larger. Over six million visitors now head here every year in search of sun, beaches, history, archaeology and hospitality.

2. ECONOMIC CONDITIONS

Over the past two years, Mexican economic policy has featured a tough anti-inflationary program called the Economic Solidarity Pact, combining traditional austerity measures (tight fiscal and monetary policies) and heterodox measures (price, wage and exchange rate controls). The program has been successful in reducing inflation, from an annual 159.2% in 1987 to 51.7% in 1988 and 20.3% in 1989. The general criteria for Mexico's macroeconomic policy in 1990 are to consolidate and fortify the progress made in price stabilization, to reaffirm gradual and sustained economic recuperation, to increase investment, both national and foreign, and to improve living standards.

Mexico's gross domestic product (GDP), after increasing 3.7% and 2.7% during 1984 and 1985 respectively, diminished by 3.5% in 1986. In 1987, it increased a moderate 1.5% and an additional 1.1% in 1988. Domestic economic activity recovered for the third consecutive year in 1989, with an estimated growth rate of 3.0%, to reach $200 billion (1) in 1989. With a population of 84.5 million, per capita GDP is estimated at $2,375. During the 1990-1994 period, GDP is expected to maintain an average annual growth rate of 2%-3%.

In an effort to revitalize and open the Mexican economy, the Mexican Government undertook a series of structural changes, including the accession to the General Agreement on Tariffs and Trade (GATT) on August 24, 1986, leading to an extensive trade liberalization process: import permits were eliminated on all but 325 of the total 11,960 tariff items on the recently adopted Harmonized System; official import prices are no longer applicable, nor the 5% export development tax, and the maximum import duty has been lowered from a maximum 100% in 1982 to 20% since January 1988. The automotive and computer industry, previously protected by import permit requirements, were also recently liberated.

According to official data from the Mexican Secretariat of Commerce and Industrial Development (SECOFI), Mexico's trade surplus in 1988 was only $1.75 billion, 80% lower than in 1987. Total exports in 1988 remained practically the same as in 1987, totalling $20.65 billion, while imports increased 48%, from $12.2 billion to $18.9 billion. Imports of consumer products increased 150%, while those of intermediate goods grew by 45% and capital goods by 55% in 1988. January-September figures for 1989 place total exports at $17.1 billion and imports at $17 billion, reflecting an annual growth rate of 8.8% and 26.2% respectively. Total Mexican imports from Canada increased 24% in 1989 to Cdn$603 million. In 1989, total trade between Mexico and Canada was valued at CDN$2,301 million: Cdn$603 million in the sale of Canadian goods and services to Mexico and Cdn$1,698 million in Canadian purchases from Mexico. Mexico and Canada have traditionally been very strong trading partners. According to Mexican figures, in 1989 1.9% of Mexico's imports came from Canada, while 1.3% of its exports were to Canada. This makes Canada Mexico's fifth largest exporter and sixth largest importer.

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1. NOTE: All values are noted in U.S. dollars except when otherwise noted ($ Mexican pesos, Cdn$, etc).

3. MARKET ASSESSMENT

Mexico's total apparent consumption of hotel and restaurant equipment and supplies was valued at $131.7 million in 1989, reflecting a 17% increase over the $112.5 million purchased the previous year. This significant growth was mostly due to a 48.5% increase in imports, which reached $41.4 million in 1989 as compared to $27.9 million in 1988 and $14.3 million in 1987. This was a result of Mexico's trade liberalization policies, which have made importing these products easier and cheaper. Domestic production, on the other hand, grew 6.8% to $113.4 million, of which 20.4% was exported.

TABLE 1
TOTAL APPARENT CONSUMPTION OF
HOTEL AND RESTAURANT EQUIPMENT AND SUPPLIES
(thousands of dollars)

	1987	1988	1989e	1992p
Production	95,715.9	112,581.8	113,351.7	135,102.2
Imports	14,303.5	27,871.8	41,386.2	59,823.0
- Exports	16,037.4	27,999.6	23,072.9	29,065.2
TOTAL	94,982.0	112,454.0	131,665.0	165,860.0

Note: e=estimated based on six month figures; p=projected.
Source: Secretaría de Comercio y Fomento Industrial (SECOFI); own estimates.

The total demand of hotel and restaurant equipment and supplies is expected to grow eight percent annually between 1990 and 1992 as a result of major investments in the tourism sector (see Section 4). Total apparent consumption is expected to reach $165.9 million in 1992. Imports will continue to grow at a faster pace than domestic production due to the relative ease with which foreign products can now be imported, their superior quality and competitiveness compared to local products in the area of high-technology products and novelties. For 1992, imports are estimated at $59.8 million. Exports will continue to increase, since Mexico's traditional exports are well accepted, due to their lower prices. Mexican suppliers will have to maintain a high level of quality control if they are to maintain present export levels and their competitiveness in the local market.

Industry estimates indicate that total investment in hotel and restaurant equipment during the next five years will need to be in the order of $800 million based on 10,000 hotel rooms being constructed annually to reach the target set by the present administration of having 50,000 more rooms by 1995. According to this source, each hotel room of the high class categories (4 stars upwards) has an average building cost of $63,600, of which 35% is for room furnishings and supplies. Demand of selected items is estimated as follows for the next five years:

ITEM	(million U.S. dollars)
Furniture for the rooms	$ 58.2
Curtains, bed linen and comforters	$ 15.4
Carpets, lamps and room decoration	$ 32.7
Sanitary fixtures and bathroom	$ 79.3
Electricity, plumbing & carpentry	$ 58.0
Servi-bar, TV, stereo, etc.	$ 56.4
Kitchen appliances and equipment	$ 55.3
Carpets and general decoration	$ 86.4
TOTAL	**$441.7**

Total imports of hotel and restaurant equipment and supplies can be divided up into the following categories:

TABLE 2
IMPORTS OF HOTEL AND RESTAURANT EQUIPMENT
(thousands of dollars)

	% OF IMPORTS IN TAP*	1987 TOTAL	1988 TOTAL	1989 TOTAL
TABLE & KITCHENWARE	23%	174.2	2,253.3	2,817.3
GLASSWARE	3%	95.7	221.0	418.9
KNIVES & BLADES	66%	445.2	1,013.6	1,556.7
TABLESETS	32%	108.0	654.6	1,246.0
KITCHEN ARTICLES	17%	13.1	162.2	302.3
BED, TABLE & BATH LINEN	27%	163.7	613.3	1,333.9
DECORATION	20%	846.2	3,666.3	7,218.9
FOOD PROCESSING EQUIPMENT	42%	6,633.4	7,147.4	8,734.0
FURNITURE	30%	123.3	1,271.8	2,251.1
AIR CONDITIONING EQ.	37%	170.8	511.2	1,196.2
REFRIGERATORS & FREEZERS	80%	930.6	2,582.1	3,883.5
HEATING & COOKING EQ	30%	892.3	1,995.2	2,234.6
WASHING & DRYING MACHINES	61%	1,371.2	2,588.8	4,235.2
COMPUTERS & TELECOM.	54%	2,335.8	3,191.0	3,957.6
TOTAL		14,303.5	27,871.8	41,386.2

*TAP= TOTAL APPARENT CONSUMPTION

This table clearly shows the dramatic increases in imports of the majority of these product areas between 1987 and 1989, in particular those which were most protected by restrictive import policies before the 1987 reforms (2).

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2 It is interesting to note that total imports in all of the above categories amounted to $300 million in 1988, up 180% over 1987 levels, and to an estimated $447 million in 1989 (based on January-June data), reflecting an additional 49% increase. Based on several trade interviews with manufacturers, distributors, end users and the Mexican Association of Tourism Suppliers (AMAIT), it was possible to estimate which proportion of this total was purchased by hotels and restaurants as opposed to households, commercial

The U.S. is by far the most important supplier of this type of equipment and supplies to Mexico, with a 65% market share. Geographic proximity has played an important role in this leadership. It reduces freight costs, permits more timely delivery and offers prompt availability of parts and service. Mexican buyers are also more familiar with U.S. products and brands in general and often visit trade shows in the U.S. to shop for the latest novelties. At the same time, many of the hotel chains established in Mexico are American.

The most important competitors, besides the U.S., are France (glasses, tableware, linen), Italy (lighting fixtures, food processing equipment, dishwashers), the Netherlands (food processing equipment), West Germany (glasses, cutlery, lighting fixtures, food processing equipment, air conditioning, heating equipment), the United Kingdom (food processing equipment), Canada (ceramic sanitary fixtures and tableware, furniture, heating & cooking equipment, refrigerators), Japan (china, tableware, carpets, air conditioning), Switzerland (knives, food processing equipment), Brazil (knives, cooking equipment), Panama (linen, refrigerators), China (carpets) and Korea (washing machines).

TABLE 3
CANADIAN IMPORTS AND EXPORTS OF HOTEL AND RESTAURANT EQUIPMENT
(Thousands of Canadian dollars)

	1987 IMPORTS	1987 EXPORTS	1988 IMPORTS	1988 EXPORTS	1989 IMPORTS	1989 EXPORT
SANITARY FIXTURES	80	0	5,243	24	4,343	0
TABLE & KITCHENWARE	151	42	200	6	284	0
GLASSWARE	304	0	700	0	689	0
KNIVES & BLADES	1	68	161	0	0	0
TABLESETS	0	0	0	0	0	5
KITCHEN ARTICLES	360	120	1,353	23	419	13
BED, TABLE & BATH	236	44	313	15	294	150
DECORATION	1,686	36	6,277	115	9,815	83
FURNITURE & LIGHTING	246	109	264	41	720	18
FOOD PROCESSING EQ.	43	145	1	81	9	521
AIR CONDITIONING EQ.	459	166	14,046	0	17,006	45
REFRIGER. & FREEZERS	212	313	199	0	114	220
HEATING & COOKING E	0	313	120	0	1,081	320
WASHING & DRYING MA	132	0	681	2	567	0
COMPUTERS & TELECO	98	531	0	1,707	1	1,528
TOTAL	4,008	1,887	29,558	2,014	20,042	2,903

Source: Statistics Canada-International Trade Division

According to Mexican statistics, Canada's import market share of hotel and restaurant equipment has increased from 1.2% in 1988 to 2.2% in 1989. Products imported from Canada include ceramic ware for table, kitchen and toilet, cut drinking glasses, cutlery

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establishments, hospitals, food processors, etc.

and tablesets, bed and table linen, carpets of man made fibers, lamps, enameled kitchen articles, meat processing machines, air conditioning equipment for wall and window, microwave ovens, cooking equipment and washing machines.

As can be seen from this table, Canadian exports have steadily increased between 1987 and 1989, at an average rate of over 20%. However, Canadian exporters have not taken the full advantage of Mexico's liberalization policies to promote their products more aggressively in Mexico. Canadian exporters should participate in trade shows staged in Mexico and consider the possibility of joint ventures and/or licensing agreements as potential tools to penetrate the Mexican market, as well as consulting services with particular emphasis on design, quality control and new product introduction. Mexican regulations allow, on a case by case basis, a portion of the production of in-bond (maquiladora) plants to be sold in the Mexican market. This portion amounts up to 20% on average.

Best prospects for foreign made equipment include hotel china, ceramic tableware, cutlery, icemaking machines, coffee and tea makers, dishwashers, vending machines, scales, food processing equipment for bakery, meat, fruits and vegetables, mixers, bakery ovens, microwave ovens, sanitary fixtures, tableware sets, lead cristal glasses, bed and table linens of man made fibers, towels, blankets and comforters, carpeting for hotels, kitchen articles, stainless steel kitchen furniture, wood bedroom furniture, window and wall air conditioning units, commercial refrigerators and freezers, water purifiers, toasters, gas cooking equipment, washing machines, vacuum cleaners, software for hotel and restaurant management and telecommunications equipment.

4. END USERS

Mexico's tourism sector represents three percent of the country's GDP and generates 533,000 direct jobs and 1.33 million indirect ones. It employed direct or indirectly 1 of every 12 Mexicans. Mexico accounts for 2.1% of total world tourist income, estimated at $150 billion in 1989, and ranks ninth in the world as a destination for tourists, with 1.7% of the total 367 million world tourists. In 1989, 6.34 million foreign tourists visited Mexico, a 11.4% increase over 1988, and spent $2.93 billion, up 15% over the $2.54 billion of the previous year. This increase was mostly due to direct concessions granted to foreign airlines such as Alaska AL and a 20% increase in chartered flights and buses. In 1990, it is projected that 6.9 million tourists visit Mexico with a total expense of $3.2 billion and that 1991 will bring 7.5 million visitors to generate an income of $3,6 billion.

Border tourism represented an additional income of $1.5 billion from 65 million tourists. Additionally national tourists, which are rapidly increasing, were estimated at 37 million in 1989, up from 34 million the previous year. Approximately 1.3 million cruise passengers visited such coastal resorts as Cozumel, Puerto Vallarta, Cabo San Lucas, Mazatlán, Ensenada, Acapulco and Zihuatanejo on 1,600 voyages. Foreign tourists spent an average of $480 per person per trip, or about $44 a day in 1989. The trend has been towards slightly longer stays, averaging 11 days, and higher average expenses. An average 85% of foreign tourists travelling to Mexico come from the U.S., 7% from Canada, 4% from Europe and 4% from other countries.

The Mexican hotel and restaurant industry is mostly owned and managed by the private sector. Mexican Government agencies such as the Council of National Resources for the Assistance of the Youth (CREA) and several worker's unions own and manage

hotels in the most important local resorts. They offer special discounted rates to their affiliates and groups. Mexican banks also maintain substantial interests in hotels and in some cases are investing in the construction of new hotels.

4.1 HOTELS

The Mexican hotel industry is ranked eighth worldwide in number of rooms. It presently consists of 7,971 registered hotels and motels offering 321,975 rooms. This is a 4% increase over last year's 7,600 hotels and 310,000 rooms and a 50% growth over the 5,300 establishments and 262,000 rooms of 1983 and a dramatic increase over the 76,000 rooms of 1960. This industry is expected to grow by 3%-4% annually in the next four years as a result of increased investments in the sector, led by the Mexican Government's support. The administration of President Salinas has defined tourism as the most promissory source of economic growth and has established a 5 year target to almost duplicate the number of tourists to 10 million a year by 1994 with a total income of $5 billion.

Mexico's hotels and motels can be divided into categories as follows:

CATEGORY	NO. OF ESTABLISHMENTS	NO. OF ROOMS
Special Class	24	3,756
Grand Tourism	16	6,343
Five Stars	125	30,815
Four Stars	380	43,075
Three Stars	774	43,284
Two Stars	1,199	46,089
One Star	1,155	35,855
Economy	1,863	45,759
Other	2,435	66,999
TOTAL	**7,971**	**321,975**

Source: CONCANACO-SERVYTUR: Panorama de la Actividad Turística en México 1989.

The hotels offering the highest export opportunities to foreign suppliers are those in the first four categories, amounting to 545 hotels with 84,000 rooms. These are the ones which cater to international and wealthy local tourists. They are the ones with the largest turnover in supplies and the largest buyers of new equipment.

A significant number of rooms are supplied by time-sharing establishments, an area in which Mexico holds the second place worldwide, after the U.S., with 10% of total world supply. There are 227 such establishments, with 12,400 apartments. Growth in this segment has averaged 16% in the last five years and is expected to continue growing rapidly. Most of these units are located in areas with a high tourism density, such as Puerto Vallarta (23.7%), Cancún (15.3%),Mazatlán (13.6%), Acapulco (11.0%), Manzanillo (8.5%), Ixtapa (7.6%) and Los Cabos (3.4%). There are 32 projects for the development of time-sharing establishments in 1989, whether through new construction

or through the remodeling of existing hotel rooms. They will be located in the same resort areas in similar proportions.

There are approximately 257 trailer parks in Mexico. These parks are mainly used by U.S. tourists an most of them are located at border resort areas.

Ten marinas were built within the last five years, with an investment of Mex$195 billion pesos, generating 16,000 jobs. Between 1981 and 1989, the Secretariat of Communications and Transportation granted 28 concessions to build marinas in Mexico, and another 47 are being reviewed. They are concentrated in the states of Baja California, Quintana Roo, Jalisco, Colima and Guerrero. New reforms were made to the law, allowing tourists to bring their boats into Mexican waters and leave them for five years. This will generate new demand for marinas in Mexico and a new source of income, since it is estimated that every boat generates $10,000 per year.

There are 38 major hotel chains in Mexico, 21 totally owned by Mexicans and 17 with 49% foreign ownership. These include the following chains:

TABLE 4
PRINCIPAL HOTEL CHAINS IN MEXICO

	G.T.	5stars	4stars	3stars	rooms	project hotels
Aristos		3	3		1,345	1
Best Western		5	24		3,450	6
Calinda		3	9	1	2,219	4
Camino Real/Westin	4	7			3,548	1
Casteles de México		3			437	
Club Mediterrannée		5	5		2,168	1
Del Prado			7		1,062	
Fiesta Americana	12				4,668	3
Fiesta Inn		1	4		703	
Hilton International	3				950	
Holiday Inn	4	11			5,145	
Howard Johnson		1	2		860	
Hyatt International		6			2,223	5
Krystal	3	1			1,515	2
Marriot	3				1,176	3
Meliá	2	4	1		2,044	
Misión		5	4	3	1,759	2
Quinta Real		3			172	3
Paraíso Radisson		5			1,279	3
Ramada Inn		5		3	345	
Real de Minas		3	2		895	
Riviera del Sol		1	1		328	2
Sheraton	2	4			2,841	
Sierra Intercontinental	3				857	
Stouffer Presidente/	1	6			2,305	3
TOTAL	**37**	**82**	**62**	**7**	**44,294**	**39**

Mexico is liberalizing its laws to attract foreign capital to build the 50,000 hotel rooms needed to meet its target. The new Law to Promote Mexican Investment and to Regulate Foreign Investment enacted May 1989, eliminates much cumbersome red tape and makes it much easier to set up a new company in Mexico. It also allows foreign investment of up to 100% in tourism, as opposed to the previous 49%. Foreign owned real estate along the Mexican borders or coastlines must be held in trust. This Law regulates direct ownership of land located 100 kms. from the border and 50 kms. from the coastline. To allow foreign financial development of this land, the Mexican Government created a real estate trust ("Fideicomiso") that enables its beneficiaries to enjoy the unrestricted use of the land and buildings for a renewable period of 30 years provided they make new productive investments for tourism or industry.

The total number of establishments is classified into seven major geographic categories:

Zone 1 includes Mexico's three largest cities and their surrounding metropolitan areas: Mexico City (D.F.), Guadalajara and Monterrey;

Zone 2 includes Mexico's major resorts:

Acapulco, Gro.	Los Cabos, BCS
Ixtapa-Zihuatanejo, Gro.	Loreto-Nopoló, BCS
Cancún, Q.R.	Manzanillo, Col.
Cozumel, Q.R.	Mazatlán, Sin.
Ensenada, BCN	Puerto Vallarta, Jal.

Zone 3 includes tourist areas to be developed:

Bahía de San Carlos, Sin.	Mérida, Yuc.
Puerto Peñasco	Isla Mujeres
Guaymas, Sin.	Oaxaca, Oax.
Bahía de Keno	Puerto Angel, Oax.
The coasts of Quintana Roo	Puerto Escondido, Oax.
The coasts of Nayarit	Bahías de Huatulco, Oax.
The coasts of Jalisco	Palenque, Chis.
Chichen-Itza, Yuc.	San Felipe
Uxmal, Yuc.	Taxco, Gro.

Zone 4 includes smaller cities where the Government has invested in some aspect of tourism development:

Altamira	Poza Rica, Ver.
Ciudad Madero	Veracruz, Ver.
Ciudad del Carmen, Camp.	Salina Cruz
Coatzacoalcos, Ver.	Villahermosa, Tab.
Minatitlán	

Zone 6 includes states with considerable foreign influence:

Baja California Norte	Nuevo León
Baja California Sur	Sonora
Chihuahua	Tamaulipas
Coahuila	

Zone 5 includes Mexican states considered to have a high potential for tourism development and Zone 7 those with some tourism development potential.

The following table lists the number of hotels, motels and rooms by state in zones five to seven for 1988.

TABLE 5
HOTELS AND ROOMS BY STATE IN 1988

ZONE	STATE	NUMBER OF HOTELS	ROOMS	SPECIAL CLASS	GRAND TOURISM	5 STARS	4 STARS
7	Aguascalientes	51	1,770	0	0	0	191
6	Baja California N	347	15,011	427	0	181	1,005
6	Baja California S	109	5,122	488	0	375	1,058
5	Campeche	72	2,046	0	0	92	477
7	Coahuila	159	5,545	0	0	526	668
7	Colima	111	4,351	293	0	256	1,289
5	Chiapas	231	6,138	0	0	112	517
7	Chihuahua	262	8,346	0	0	269	733
1	Distrito Federal	604	41,615	252	2,210	4,175	4,185
7	Durango	119	3,178	0	0	0	269
5	Guanajuato	269	10,095	18	0	0	1,392
7	Guerrero	459	25,975	1,679	1,131	4,359	2,071
7	Hidalgo	135	3,597	0	0	0	114
7	Jalisco	639	31,144	510	474	4,627	4,181
7	Mexico	219	8,332	0	0	807	695
5	Michoacán	368	11,027	69	0	126	1,908
5	Morelos	185	5,562	15	0	402	175
7	Nayarit	183	4,698	0	0	0	321
7	Nuevo León	73	5,033	0	0	1,295	536
5	Oaxaca	239	7,319	0	0	91	225
7	Puebla	195	6,908	0	0	514	371
7	Querétaro	103	4,450	48	0	175	806
7	Quintana Roo	214	13,258	0	1,394	1,564	3,160
7	Sn Luis Potosí	153	4,904	0	0	211	730
7	Sinaloa	243	12,115	0	0	1,101	1,879
6	Sonora	247	10,885	0	0	218	1,087
7	Tabasco	123	4,476	0	0	455	469
7	Tamaulipas	324	10,471	0	0	103	1,246
7	Tlaxcala	42	1,036	0	0	111	123
5	Veracruz	784	23,314	0	0	371	726
5	Yucatán	130	4,794	0	0	206	1,372
7	Zacatecas	115	3,052	0	0	0	361
TOTAL		**7,507**	**305,567**	**4,099**	**5,209**	**22,722**	**34,340**

Source: CONCANACO-SERVYTUR: Panorama de la Actividad Turística en México 1989.

As can be seen from this table, the state of Veracruz has the largest number of registered hotels however, Mexico City offers the highest amount of rooms. Other states with significant hotel accommodations are Guerrero (Acapulco and Ixtapa), Jalisco (Guadalajara), Baja California Norte (Ensenada, Tijuana) and Quintana Roo (Cancún, Cozumel). The states with the largest growth in rooms during 1989 were

Jalisco (10,675 rooms), Quintana Roo (3,876), Chihuahua (3,676), Baja California Norte (772), Oaxaca (638), Tamaulipas (423), Mexico (342), Puebla (327) and Guerrero. (235). States that will be developed in the future include Oaxaca (Huatulco, Oaxaca), Guerrero, Quintana Roo (Cancún) and Baja California Sur (Los Cabos). Approximately 60% of foreign tourists registered in hotels visited beach resort areas.

The average percentage of hotel occupancy in Mexico's principal resorts is as follows:

TABLE 6
HOTEL OCCUPANCY
(percent)

RESORT	1984	1985	1986	1987	1988	1989*
Acapulco	55.1	50.0	50.3	55.3	50.6	51.9
Cancún	72.3	72.1	81.1	83.5	55.8	55.3
Cozumel	61.4	55.3	59.8	65.2	52.9	43.2
Mexico City	60.0	55.7	59.2	60.3	57.4	56.0
Guadalajara	61.7	53.6	54.2	53.9	51.3	54.6
Ixtapa	52.4	46.6	46.6	59.4	54.8	49.1
Mazatlán	56.7	54.4	50.6	54.4	56.5	54.7
Pto. Vallarta	67.9	55.2	56.8	68.7	59.7	53.7

* Jan-Oct (since the high season is excluded these are underestimated)
Source: CONCANACO-SERVYTUR: Panorama de la Actividad Turística en México 1989.

All resorts show lower results in 1988 as compared to 1987. This was mostly due to an increase in rooms available with an sufficient promotion in past years to advertise them broadly on an international basis, as well as to severe damages caused by hurricanes and other bad weather conditions, which required that certain resorts be closed for several weeks and then remodeled afterwards. Another problem was the lack of necessary flights to many of these destinations, as a result of the temporary closure of Mexico's second national airline, Aeromexico. These problems have been addressed and 1989 already shows signs of recovery.

Approximately $80 million will be invested annually to promote Mexican resorts abroad. Some $20 million will come from government sources, while the private sector will triple these funds. A major Mexico promotion is masterminded by Saatchi & Saatchi, New York and acts as an umbrella campaign for an extensive effort to promote destinations within the country, rather than particular hotels or chains, under the tagline "Come, Feel the Warmth of Mexico", featuring mostly beaches, but also a "myriad type of attractions".

Mexico is opening up the skies and roads to foreign firms, by allowing non-Mexican bus passenger carrying companies and airlines to enter the country with passengers, therefore no longer protecting national carriers. There used to be 52 authorized air routes, now there are 600, although not all are yet covered. Mexicana airlines plans to transport over 9 million passengers in 1990. At present it has over 40 weekly flights to Cancún and Cozumel. It will incorporate 7 new planes to the existing 48, schedule new flights and improve service. New docks are also being built to attract boat visitors.

4.2 RESTAURANTS

There are approximately 60,000 restaurants in Mexico, which feed some three million people every day. Only 5,134 of these restaurants are registered with the Ministry of Tourism. Of these, 87.5% are located within a hotel. Registration has, until now, been a very cumbersome process, requiring several permits and licenses, reason why only very few are presently registered. Following are data on the number of registered food and beverage establishments registered with SECTUR, both in hotels and as independent establishments:

TABLE 7
REGISTERED RESTAURANTS

	1988 HOTEL	1988 INDEP.	1988 TOTAL	1989 HOTEL	1989 INDEP.	TOTAL
Restaurants	1,605	214	1,819	1,680	208	1,888
Restaurant-bars	687	311	990	769	280	1,049
Bars	1,248	111	1,359	1,330	95	1,425
Discotheques and night clubs	286	29	315	302	21	323
Cafeterias	382	45	427	412	37	449
TOTAL	4,208	710	4,918	4,493	641	5,134

Source: CONCANACO-SERVYTUR: Panorama de la Actividad Turística en México 1989.

This activity is extremely important, since 30% of a tourist's total expense corresponds to food products and generates significant foreign exchange income. Additionally, it is estimated that 600,000 persons are employed in this sector, or 3% of the country's total labor population. Mexico's restaurants serve three million people daily and the number of establishments increases 1.5% per year. It is estimated that 12,000 of the total establishments are located in Mexico City.

In addition to the large hotel chains mentioned above, important restaurant chains include Pollo Loco (53 restaurants), Kentucky Fried Chicken (52), Burger Boy (49), VIP'S (47), Anderson (38), Sanborn's (37), Woolworth (26), Denny's (22), Tok's (21) and McDonalds (7).

5. INVESTMENTS AND FINANCING

Total private and public investment in the tourism sector between 1985 and 1988 amounted to a total of $2.6 billion. Of this amount, $585.7 million were invested by the public sector, $548.6 million by private hotels and the remaining $1.5 billion by other investors. The geographical distribution of the total amount invested was in the resorts of Huatulco (27%), Cancún ((20%), Loreto (18%), Los Cabos (16%), Ixtapa (11%) and other areas. It is interesting to note that public investment was concentrated in

developing the new areas of Huatulco and Loreto, while private hotel investment was largest in Cancún and Ixtapa, the proven resorts. In 1989, total investment in tourism amounted to $750 million and 30% of total foreign investment in Mexico was in this sector.

The Government owned National Fund for the Promotion of Tourism (FONATUR) was created in 1973 to provide financing to the tourism sector. These funds have predominantly been oriented towards the construction, remodeling and broadening of hotels, however they are also used to build hotel condominiums, time sharing establishments, restaurants and bars, for guides-chauffeurs, car rentals, travel agencies, tourism marinas and other projects related to this industry.

FONATUR has created five tourism centers in the last 15 years: Cancún, Ixtapa-Zihuatanejo, Los Cabos, Loreto and Huatulco, and so far has installed over 150 hotels and 25,000 rooms. According to FONATUR, in order to achieve the new plans envisioning the construction of 50,000 hotel rooms in the next five years, for every dollar invested in tourism infrastructure -new highways, sewage systems and initial hotel construction-, another ten dollars will have to come from private investors. Usually, FONATUR makes the initial investment and then sells off its equity interests in hotels to private investors who were unable or unwilling to invest initially.

The following table shows financing granted by FONATUR between 1984 and 1989:

TABLE 8
FINANCING BY FONATUR 1984-1989
(millions of dollars)

YEAR	APPROVED AMOUNT	INVESTMENT GENERATED	NEW ROOMS	REMODELED ROOMS	EMPLOY. GENERATED
1984	$182.3	$ 364.8	5,275	3,196	4,958
1985	$179.8	$ 236.0	5,002	4,688	5,572
1986	$142.0	$ 233.9	5,545	3,969	3,745
1987	$159.3	$ 288.4	5,058	1,864	4,067
1988	$ 9.4	$ 14.8	403	202	283
1989	$119.2	$ 437.6	6,800	4,400	4,446
TOTAL	$792.0	$1,575.5	28,083	18,319	23,071

Source: CONCANACO-SERVYTUR: Panorama de la Actividad Turística en México 1989.

FONATUR invested $159.3 million in 1987 for the construction of 5,058 new rooms and the remodeling of another 1,864. In 1988, it only invested $9 million as a result of the Economic Solidarity Pact, which stopped all financing not approved before December 1987; 1989 shows signs of recovery again, with a total financing of $119 million approved to create 11,200 rooms. Of the new rooms approved, 29% were in grand tourism hotels, 20% in five stars, 30% in four stars, 7% in special class and 6% in time sharing establishments. Remodeled rooms were concentrated in four star hotels (50%) and five star ones (31%). Total financing approved between 1984 and 1989 was distributed geographically as follows: Quintana Roo (30%), Mexico City (11%), Oaxaca (10%), Nuevo León (8%), Guerrero (7%), Sinaloa (5%), Jalisco (5%), Baja California Norte (3%) and Sonora (3%) among the most significant.

During the next five years, FONATUR will invest $500 million in the infrastructure of the centers of Cancún, Huatulco, Ixtapa-Zihuatanejo, Los Cabos and Loreto in addition to a $70 million credit project, destined to consolidate existing resorts and to promote the megaprojects. In order to increase the participation of economic, one and two star hotels in the FONATUR financing, the State Guarantee Funds were created to support small and medium sized companies by providing a line of credit 10 times that of the initial financing by the state government, as well as guaranteeing small firms to obtain credit at commercial banks and providing technical, administrative and promotion assistance. There are presently seven funds in Tlaxcala, Hidalgo, Sonora, Sinaloa, Chiapas and Chihuahua.

Tourism financing programs are now available from local banks to small and medium sized investors as well as new rules on land purchase. The National Bank for Foreign Trade (BNCE) had a $300 million program in 1989 to finance tourism projects. Investment in 23 hotels was approved with $175 million of which $85 were disbursed during 1989.

The Mexican stock market was allowed to issue tourism bonds to increase financing for this sector. A new corporate bond indexed to the free dollar exchange rate was approved to be issued by companies in dollar-generating sectors such as tourism. This will help Mexican hotel companies obtain less expensive financing for their expansion.

The World Bank recently granted a $300 million loan to FONATUR to finance the construction of 8,000 new hotel rooms in already existing resorts, such as Puerto Vallarta, Ixtapa, Huatulco, Cancún and Puerto Escondido during 1990. This will be the first of a series of annual credits totalling three billion dollars for the construction of 8,000 rooms per year. The Interamerican Development Bank (IDB) will destine new resources to Mexico's tourism infrastructure, agriculture and mining.

In 1986, Mexico established a debt-equity conversion (swap) program in certain sectors, including tourism. This program allowed foreign firms to purchase Mexican debt at a discount and to redeem it in Mexico for a higher dollar value, payable in pesos, for investment. In 1986, this program financed 17% of total tourism investment. During 1986 and 1987, FONATUR negotiated $918 million in swaps for tourism, of which $207 has been effected, $356 approved and $356 in progress, representing 31% of total swaps. This program was suspended in late 1987 because of its inflationary impact. At the end of 1989 this mechanism was reinstalled to privatize parastate companies and for the tourism sector. The total nominal value of the debt is limited to one billion dollars per year for a 3 1/2 year period with a maximum discount of 35%. No transactions have as yet been approved.

6. PROJECTS

The National Development Program for the 1989-1994 period identifies tourism as one of the most important areas to be developed, since it still has a large potential. The objectives for the period are to increase and improve existing tourism facilities, increase the flow of both national and international tourists and therefore generate employment and foreign exchange income. Other areas stressed are to improve service qualitatively through training, increase security for tourists, increase the number of incoming flights and road traffic, develop nautic tourism through cruisers and marinas, promote a more

uniform hotel occupancy throughout the year, promote private and state investment, review the legal framework and strengthen the operation of FONATUR.

The targets set for the 1989-1994 period are:
- 50,000 additional hotel rooms
- 100,000 additional beds
- 10 million foreign tourists to Mexico by 1994
- Total foreign exchange income from tourism of $5 billion in 1994
- 100,000 visitors through recreative ships
- 1,392,000 visitors via cruisers
- 50,000 visitors by private airplanes

In order to reach this, a total investment of $4.5 billion is expected to be needed. The areas identified for development in the 1990-1994 period are Huatulco, Nuevo Vallarta, Los Cabos, Loreto, Ixtapa-Zihuatanejo and the coasts of Quintana Roo, in particular Tulum. Cancún is expected to have 24,000 rooms by the year 2,000 and attract two million visitors. Three aspects are important to boost Mexico's tourism industry: promotion, transportation and hotel rooms.

The federal government has created a new formula to develop certain tourism areas through the development of infrastructure and the preparation of a massive supply of land to be sold to private investors, both national and foreign, who will then develop the suprastructure of the resort and strengthen its image. Each of the ten proposed megaprojects will be a self-sufficient tourism complex with its own airport, roads, marina, electric generators, water supply, gardens, church, hospital and workers houses, in addition to hotels, restaurants, boutiques, shopping centers, museums, sports facilities and other entertainment centers. It is estimated that these projects will generate 55,000 direct employments and 125,000 indirect ones and that they will attract 1.5 million foreign tourists and $800 million in income, as well as 700,000 local tourists and $500 million in income.

The construction of the 10 megaprojects will require a total investment by national and international private investors of $8.3 billion to develop infra and suprastructure, with the support of FONATUR and SECTUR. These projects will be built in existing resorts with first quality land to develop. In the first phase, the projects to be developed are Cancún (Cancún, Puerto Cancún and San Buenaventura); Huatulco (Puerto Chahué and Bahía Cacaluta); Ixtapa (Marina Ixtapa and Punta Ixtapa); Baja California Sur (Punta Bonó, Punta Nopoló and Puerto Escondido); in addition to Palenque (Villas Arqueológicas) and Cozumel (Cozumel Náutico). The following hotel chains and companies will participate in the megaprojects: Camino Real-Westin, Stouffer-Presidente, Conrad International, Nikko, Sheraton and Radisson.

FONATUR is also planning to join existing resort areas by means of tourist corridors. One is projected to run 25 miles between San José del Cabo and Cabo San Lucas in Baja California; another will join Tulum to Cancún (80 miles) in Quintana Roo; a third one will run 180 miles between Puerto Vallarta and Manzanillo along the northern Pacific Coast, and another will join Ixtapa-Zihuatanejo to Puerto Angel along 600 miles of unique bays and beaches between the states of Guerrero and Oaxaca.

Cementos Mexicanos and Marriott International have entered into a $150 million joint investment to construct three hotels this year in Puerto Vallarta (426 rooms), Cozumel (300 rooms) and Cancún (450 rooms). Another eight are on the drawing board, for an estimated investment of $500 million in the next five years to build 11 new grand tourism

hotels in various resorts throughout the country , including Mexico City, Huatulco, Ixtapa, Acapulco, Cancún and Los Cabos.

The Camino Real hotels, now called Real Turismo, after its consolidation with the Calinda Hotels and Fraccionadora y Hotelera del Pacífico (Las Hadas and Maeva hotels), are remodeling and expanding their hotels in Cancún, Puerto Vallarta, Mexico City and Acapulco. All together, this group now has 27 hotels and 10,000 rooms. Grupo Real Turismo invested $140 million in 1989 and $120 million more will be invested to finalize hotels in Cozumel and Cancún and to build a new hotel in Puerto Vallarta, in addition to a chain of highway hotels for tourists travelling by car. Lately, this group has invested in Mazatlán, las Brisas, built two towers in Cancún (Calinda and Camino Real) and los Cabos and finalized the Clarion-Calinda in Mexico City.

Consorcio Hotelero Plus, a subsidiary of Holding Fiasa, plans to invest $45 million in the construction of two hotels in Nuevo Vallarta and Cozumel. This group started to operate with the inauguration of the Clarion Reforma in March 1989. Its second project is the Royal Maeva hotel in Huatulco, which opened at the end of the year.

Promotora Mexicana de Hoteles, a wholly Mexican owned company, acquired the shares of Posadas de México, owners of the Fiesta Americana, Holiday Inn and Crowne Plaza, Fiesta Inn and Fiesta hotels. This group plans to open five new hotels in 1990, to add to the existing 30, and has several new projects underway.

In October 1988, the Grupo San Luis, a Mexican holding company purchased the Hyatt Exelaris hotel chain with four hotels, two in Acapulco (Hyatt Regency and Hyatt Continental), the Hyatt Regency Cancún and the Hacienda Galindo in Querétaro. It also acquired 51% of the shares of their operating company and another four Hyatt hotels in Cancún, Villahermosa, Guadalajara and Chihuahua. This group is planning investments in Punta Diamante, Los Cabos, Puerto Vallarta, Ixtapa, Puerto Aventuras, Bahía del Carmen and Mexico City.

Conrad hotels, a subsidiary of Hilton hotels, and its Mexican joint-venture partner Bancomer, will open a 400 room Conrad Cancún. Another 300 room hotel is nearing completion in Puerto Vallarta and will be opened in November 1990, and a third 300 room hotel is under construction in Cabo San Lucas and will begin operating in August of 1991.

The Hotel Paraíso Raddison chain has opened its 300 room hotel in Cancún, a 241 room one in Mexico City, one in Zacatecas and plans to develop other properties in Puerto Vallarta, Oaxaca, Puerto Escondido, Aguascalientes, Mazatlán, Ixtapa and Guaymas.

Hoteca, a joint venture of Mexican businessmen and the Ramada Inn chain is projecting an initial investment of $200 million for the construction of hotels in La Paz, Bahía de San Carlos, Puerto Vallarta, Acapulco and Ixtapa. It also recently opened its 226 room hotel in Cancún.

The U.S.-Switzerland owned hotel chain, Stouffer Hotels and Resorts, recently joined Nacional Hotelera, owners of the Mexican Presidente hotel chain in a joint venture agreement to expand in Mexico's costal resorts. This group will build three hotels in Puerto Vallarta, Acapulco and Huatulco in addition to the operation of seven hotels in Mexico City, Cancún, Cozumel, Oaxaca, Loreto, Los Cabos and Ixtapa.

The U.S. based OMNI corporation recently opened its second hotel, after Cancún, in Mexico with an investment of $25 million in Ixtapa. This hotel has 300 rooms, 13 junior suites, 12 master suites and one presidential suite. This group is building a hotel in Puerto Vallarta and plans another in Los Cabos.

Over $35 million are going into a new hotel and condominium in Los Cabos from national and foreign investors. The state of Baja California Sur is investing in a $43 million infrastructure development plan. By March 1991, Los Cabos is estimated to have 6,000 hotel rooms, two times those existing in 1989. By 1994, an additional 3,000 rooms will be built. Starting in 1990, $500 million will be invested in this resort and in the state of Baja California Sur. Projects to be initiated are Fidepaz and Costa Baja in La Paz, as well as Puerto Escondido and Loreto to be built within 6-7 years. Private investors will invest $400 million in the new hotel Guaycura in Loreto. Hotel chains with projects in Baja California Sur are Hyatt International in Cabo San Lucas, Krystal and Marriott in San José de los Cabos, and Radisson in Puerto Escondido.

SECTUR plans to exploit the tourism potential of the border cities, now receiving 156 million border crossings per year (or 60% of tourists that visit the country), through the Programa Turístico de la Frontera Norte, which will include urban projects, hotel and tourism services, to be financed by Banobras, Bancomext and FONATUR. FODETUR (Fondo Estatal Turístico) will support small investors in Sonora to broaden and remodel hotels, build restaurants, purchase buses and increase tourism services in that state. Several hotels are projected along the border states: Hotel chains Best Western in Tijuana and San Felipe, Calinda and Riviera del Sol in Tijuana

Approximately $25,000 will be invested to improve marine, airport, street and public services infrastructure in Puerto Vallarta. This is a promising area in which U.S., Canadian and European investors are interested. The Cemex-Marriott joint-venture will finalize a new time sharing establishment in Puerto Vallarta with 219 de luxe units consisting of a 144 m2 area with two bedrooms, living and dining-room with a $40 million investment. The Sol-Meliá Vallarta was inaugurated in December 1989. The Best Western, Hyatt International, Paraíso Radisson and Stouffer Presidente chains have hotels projected in Puerto Vallarta.

The government of the state of Jalisco, in association with leaders of Jalisco's private sector, have formed the State Council for Tourism Development, with an initial capital of $1.2 billion in the form of a trust fund. This will be used to promote the construction of resorts along Jalisco's 198 miles of Pacific coast beaches from Puerto Vallarta to Barra de Navidad. U.S. and French investors plan to invest in infrastructure in Cuixmala, Jalisco, where an important ecological reserve of exotic animals exists, in order to preserve the area and open it to small groups of interested visitors.

In the state of Colima, the local government is planing to build a convention center and a horse race track, as well as an international shopping center and will finance 50% of the project. In Manzanillo $50 million will be invested in a new hotel development program. Over $400 million will be invested in a major new project in Juluapán on the Santiago Bay, Colima, including a 190 yacht marina. In future years, up to five hotels will be built, condominiums, villas, a golf course, recreation areas, restaurants and shops. Presently, Banamex is co-investing in the construction of the $40 million Sierra Continental hotel.

Grupo Sidek will invest $80 million annually during the next eight years, for a total amount of $640 million, in the Marina-Ixtapa megaproject, which will include a hotel with marina, sport complexes and golf course.

In the Acapulco-Puerto Marquez area, a new joint-venture between the state of Guerrero and ICA, a major construction firm, is underway through the urbanization of "Punta Diamante" with an investment of $90 million. This will translate into major investments for the construction of 6,000 to 8,000 hotel rooms estimated at between $400 and $800 million. The port of Acapulco presently has 500 hotels, 1,000 restaurants, 300 bars and discotheques. The state government will invest $25 million to better equip its beaches. Three new hotels are projected in Acapulco. A second marina for 372 ships has been started at Punta Sirena in Acapulco, called the "La Marina" tourism complex, with an investment of $25 million. This will also feature 64 condominiums, hotels, a yacht club and shopping center. Projected hotels in Acapulco are the Aristos, Best Western, Hyatt ans Stouffer Presidente.

Bahías de Huatulco, the most recently developed complex, on Mexico's Pacific Coast in the state of Oaxaca, embraces a 22 mile stretch of coastline and consists of nine bays. It is expected to have 27,000 rooms by the year 2020 and be able to host two million visitors annually. The Sheraton hotel and Club Med are pioneers in this area. The Club Mediterranee built a 500 room hotel, recreational and sports facilities in this complex, which was the first one to open in December 1987. It is a joint venture between Club Med, FONATUR and Bancomer (one of Mexico's largest banks). Three additional hotels are being built by FONATUR in this complex, with the participation of three foreign investors: Societé des Hotels Concorde, Bank Lazard Freres and the Moorings Ltd., in association with Banamex (a large Mexican bank), Grupo ICA (a major construction contractor in Mexico) and some independent businessmen. Hotel chains projecting to build in Huatulco include Krystal, Marriott, Quinta Real, Riviera del Sol and Stouffer Presidente. The federal and state governments have invested $250 million in the construction of the Huatulco international airport and in the urbanization of the bays of Tangolunda, La Crucesita, Chahué, and Santa Cruz.

In the city of Veracruz, the airport will be enlarged and a new convention center will be built, as well as five first class hotels. The archaeological zone of Tajín is being restaurated and the Tecolutla beach zone will be rescued, with a total investment of $800 million. The los Tuxtlas region, called the Costa Esmeralda, will become a first level tourism resort to attract tourism from Canada and the U.S. Between December 1989 and April 1990 an estimated 7,000 Canadian tourists are expected in Veracruz from Montreal and Toronto.

The 1988 created Puerto Aventuras resort across the island of Cozumel is already popular. Representing an investment of $43 million, it features the only marina on the Caribbean, with a capacity for 120 yachts, a golf course, international quality tennis courts and beach clubs. There is presently a 40 room hotel and several grand tourism hotels are under construction. Its expansion is already being planned and total investments in hotels and condominiums are estimated at $214 million. Hotel chains with hotels projected in the Cancún cozumel area include Best Western, Calinda, Camino Real, Fiesta Americana and Hyatt.

7. MARKET ACCESS

Sales are usually made through local agents and distributors, normally operating on a commission basis. Imports of hotel and restaurant equipment and supplies are subject to an ad valorem duty ranging from 10% to a maximum 20% assessed on the C.I.F.

invoice value. In addition, a 0.6% customs processing fee is assessed on the invoice value. A 15% value added tax is then assessed on the cumulative value of the above taxes and the invoice value.

There are no official metric requirements applicable to imports into Mexico, However, since the metric system of units is by law the official standard of weights and measures in Mexico, importers will usually require metric labeling for packaged goods, although the English system is also used. Dual labeling is acceptable. Imported products should be labeled in Spanish containing the following information: name of the product, trade name and address of the manufacturer, net contents, serial number of equipment, date of manufacture, electrical specifications, precautionary information on dangerous products, instructions for use, handling and/or product conservation and mandatory standards. Electrical standards are the same as in Canada. Electric power is 60 cycles with normal voltage being 110, 220 and 400. Three phase and single phase 230 volt current is also available.

Prepared by:
Caroline Vérut for
The Canadian Embassy
Mexico City
April 1990

APPENDIX I

USEFUL ASSOCIATIONS AND DEPARTMENTS

ASOCIACION MEXICANA DE HOTELES Y MOTELES, A.C.
HAMBURGO 108 - 104
COL. JUAREZ
MEXICO, D.F.
Tel 5256863
Fax 5250303

MEXICAN NATIONAL HOTEL AND MOTEL ASSOCIATION

ASOCIACION MEXICANA DE HOTELES Y MOTELES DE LA CIUDAD DE MEXICO, A.C.,
THIERS 83
11590 MEXICO, D.F.
Tels 2036455 and 2501054

HOTEL AND MOTEL ASSOCIATION FOR MEXICO CITY

ABASTECEDORES TURISTICOS, A.C. (AMAIT)
MIGUEL CERVANTES DE SAAVEDRA 93
11520 MEXICO, D.F.

Tel 5313610 and 5313293 to 95
FAX 5319052

ASSOCIATION OF SUPPLIERS TO THE MEXICAN TOURISM SECTOR

ASOCIACION NACIONAL DE IMPORTADORES Y EXPORTADORES DE LA REPUBLICA MEXICANA (ANIERM)
Monterrey 130
Mexico 7, D.F.
Ph. 564-9379
FAX 5845317

Mexican National Importers & Exporters Association

SECRETARIA DE TURISMO (MINISTRY OF TOURISM)

Av. Presidente Masaryk 172-8vo Piso
México 11587, D.F.

Touristic Information (several languages) 250 01 23 250 01 51
Inf 250 81 71 SB 250 85 55 250 86 01 211 00 99

FAX 254-40-36
TELEX 1777566 SETUME

Fondo Nacional de Fomento al Turismo - FONATUR

Av. Insurgentes Sur 800-22o Piso
México 03100 D.F.

Tel 660 42 22

Lic. Pedro Joaquín Coldwell - Director General Tel 687 26 97
Fund for the promotion and opening up of new tourist areas throughout the nation.

LEADING HOTEL CHAINS IN MEXICO

APPENDIX II

COMPAÑIA HOTELERA DE COCOYOC, S.A.

Ventas: Insurgentes Sur # 2383-1er. Piso, 01000
México, D.F.
☎ 550-44-22 550-22-21.
Reservaciones: Insurgentes Sur # 2374 Local 44, 01000
México, D.F.
☎ 550-73-31 550-64-80.
Telex: 1772042.

CENTRAL DE RESERVACIONES HOLIDAY INN

Av. Constituyentes # 2221 Pte.,
64010 Monterrey, N. L.
Reservaciones:
☎ 48-59-46.
Grupos:
☎ 47-01-33 47-02-34.
Sr. Felipe Ríos, Gerente de Ventas y Representante.

CLUB MAEVA MANZANILLO

Insurgentes Sur # 667-10º Piso,
03810 México, D.F.
☎ 523-06-27 536-56-76 687-85-78.
536-68-98. Telex: 1777481.
Sra. Bertha Lira Plata, Gerente de Mercadotecnia y Comercialización.

CLUB MED
(Operadora de Aldeas Vacacionales, S.A. de C.V.)

Av Presidente Mazaryk # 183,
11570 México, D.F.
☎ 203-31-94 203-30-86 203-31-53. Telex: 1763346.
Fax: 203-06-81.
Sr. Maurice Bezaquen,
Director General.
Sr Gustavo Cantú,
Gerente de Ventas.

HOTELES CAMINO REAL, S.A DE C.V.
WESTIN HOTELS

Dante # 14, 11590 México, D.F.
Reservaciones:
☎ 203-11-33.
Oficinas Corporativas:
☎ 203-31-13.
Ing. Leopoldo Gómez, Director General Real Turismo.
Sr. Jean Berthelot,
Director General de OCASA (Ht.C.R.S.A).
Sr. Andrés Rossetto, Director General

GRUPO SOL

Bosque de Duraznos # 69 B-C,
11700 México, D.F.
☎ 596-22-46 251-18-81
251-22-79. Fax: 596-22-06.
Sr. Jacques de Paep, Gerente de Ventas y Mercadotecnia.
Meliá Hoteles
Sol Hoteles

HILTON HOTELS CORPORATION (Continental Plus, S.C.)

Av. Ejército Nacional # 728 Mezzanine,
11560 México, D.F.
☎ 255-14-90. Fax: 250-70-40.
Sr. José Jové, Director de Ventas y Mercadotecnia para México y Centroamérica. Srita. Vicky Campos, Gerente de Ventas.

HOLYDAY INN MEXICANA, S.A.

California # 106, 03100 México, D.F.
☎ 559-32-33 559-11-11.
Telex: 1775856. Fax: 559-52-07.
Sr. Adolfo Noriega, Director de Ventas Internacionales. Sra. Arlina Z. de Barba, Gerente de Reservaciones Latinoamérica.

POSADAS DE MEXICO, S.A. DE C.V.

Compañía Operadora de Hoteles
Fiesta Americana y Holiday Inn
Reforma Lomas # 155-2o. Piso,
11000 México, D.F.
☎ 570-81-22. Fax: 570-61-66.
☎ Reservaciones: 570-71-11.
Sr. Jean Boyancé, Director General.
Sr. Manuel Olalz, Director Corporativo y Mercadotecnia.

HOTELES POSADA REAL

Adolfo Prieto # 1238, 03100 México, D.F.
☎ 559-90-55. 559-95-54
559-98-45. Fax: 575-51-63.
Reservaciones:
☎ 575-50-58 575-15-56.
Lic. Guillermo Cepeda, Director Comercial. Lic. Guillermo Cepeda, Director Comercial. Lic. Manuela Wanner, Subdirectora de Ventas.

HOTELES INTER-CONTINENTAL (RESOTEL)

Darwin # 32-7º. Piso,
11590 México, D.F.
☎ 545-56-76 203-80-14
255-12-03. Fax:.255-04-41.
Telex: 1763455 WALVME.
Leonor Meade, Director General.

HOTELES AMERICANA

Berna # 3-6o. Piso, 06600 México, D.F.
☎ .
Telex: 1771608.
Sra. Ella Ponce, Directora Oficinas México. Sra. Donna Pace, Directora de Ventas.

HOTELES ARISTOS, S.A.

P. de la Reforma # 276,
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☎ 211-01-12.
Sr. Oscar Reducindo,
Director Corporativo de Ventas.
Srita. Magdalena Morales,
Gerente de Reservaciones.

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José Vasconcelos # 208 P.B. y P.H.,
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Fax: 286-56-79 Telex: 1761026.
Lic. Rodolfo López Negrete,
Director General.
Lic. Carlos Rodríguez Amieva,
Director Comercial.

HOTELES HYATT MEXICO

Oficinas Centales
Jaime Balmes # 11, Torre D-201,
2º. Piso, 11510 México, D.F.
☎ 395-52-11 395-55-80 395-16-52
395-16-01. Fax: 395-19-94.
Sr. Rainer Mohaupt, Vicepresidente Area Latinoamérica y Director General.
Sr. Neil Sabin, Director
de Mercadotecnia para Latinoamérica.
Sr. Miguel Angel Mondéjar, Director Nacional de Ventas.

TURISOL

(Hotel el Tapatío)
Guadalajara México Resort & Racquet Club
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☎ 35-60-50. Telex. 681619.
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592-23-12. Telex. 1772187 HETME.
Sr. Manuel Curiel, Director en Guadalajara.

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Oficina de Reservaciones:
Atenas # 44 P.B., 06600
México, D.F.
☎ 566-66-00 705-15-15 ext. 3954.
Srita. Elizabeth Laborín,
Gerente de Reservaciones.
Centro de Reservaciones Aeropuerto D.F.
☎ 784-83-15 784-83-45.

HOTELES RITZ

Augusto Comte # 35,
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Telex. 1777339.
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HOTELES MISION

Promotora Hotelera Misión, S.A.
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☎ 525-03-93. Fax: 511-68-97.
Telex. 1761297.
Sr. Roberto Zapata Gil, Director General.
Sr. José Luis Marín, Vice Presidente Comercial.

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P. de la Reforma # 234 Mezzanine,
06600 México, D.F.
☎ 208-01-46 208-02-06 208-02-79.
Sra. Carmen Ibarra, Directora.
Sr. Juan Carlos Ibarra, Gerente de Ventas.

HOTELES KRYSTAL

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03600México, D.F.
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Sr. Iddar de la Parra, Director General
Sr. Carlos Puga, Director de Operaciones. Sr. Agustín Chávez, Director de Ventas. Sr. José García, Director de Finanzas.

MERCADOTECNIA INTERNACIONAL TURISTICA, S.A. MITSA

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203-09-39.
Telex. 1763539 MITSME.
Fax: 545-55-66.
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Mary Tere Acevedo, Director de Ventas.

MARRIOTT MEXICANA, S.A. DE C.V.

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Reservaciones:
☎ 533-62-15.
Ventas:
☎ 533-40-60.
Telex. 1771195 MARME.
Fax: 511-15-81.
Sr. Ernesto Navarrete, Vicepresidente de Ventas y Mercadotecnia México.
Sra. Cristina Gutiérrez, Directora de Ventas.

MARIA ISABEL SHERATON HOTEL & TOWERS

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Telex: 1773936.
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Sr. Mario Orozco.
Reservaciones Locales:
Srita. Martha Hernández.

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Insurgentes Centro # 149,
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☎ 546-45-40 al 47 535-06-56.
Reservaciones: 535-01-07.
Telex: 176-2049 OPCEME.
Fax: 535-07-71.
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Alfred Freudenthaler, Director General.
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Hotel Hacienda Vista Hermosa
Hotel Cantamar.

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Sr. Eduardo Pizarro,
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64000 Monterrey, N.L.
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44-64-14. Telex: 382470, 382374 y 382973. Fax: 42-38-31.
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Sr. Arturo Carcaño Barbosa, Director General. Sr. David Reyna, Gerente de Ventas.

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06030
México, D.F.
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Fax: 208-62-48.
Telex. 1776353 REHOME.
Sr. Alejandro Meneses Fernández,
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Director General.
Ing. Marco Antonio Martínez Oropeza,
Director de Ventas y Mercadotecnia.

NUEVOS CONCEPTOS VACACIONALES, S.C.

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06700 México, D.F.
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44140 Guadalajara, Jal.
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Srita. Edna Montero, Gerente General.

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Sr. William Davis, Director Comercial
Sr. Alejandro Salas, Gerente de Ventas.
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Telex. 1761862 RAMAME.
Sr. José Gómez C., Director de Ventas y Reservaciones.

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511-90-68. Fax: 533-27-37.
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Sra. Gloria Patiño de Bastón, Gerente General. Sr. Jesús de Garay R., Gerente de Ventas

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México, D.F.
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Sr. Guillermo Reynoso, Gerente de Reservaciones.

OPERADORA TURISTICA DE HOTELES Y RESTAURANTES HACIENDA REAL, S.A.

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☎ 534-71-17.
Sr. Lucio Sánchez Franco, Director General. Héctor González, Gerente General.

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Gerente de Ventas Nacional.
Sra. Yolanda Tirán, Reservaciones.

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Reservaciones: 553-54-44.
Telex: 1771494 VIVAME.
Sr. Jorge Yáñez F., Director General.
Lic. Alfonso Bisogno E., Gerente de Ventas.
Hoteles Viva

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Srita. Silvia García, Directora Regional.

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06470 México, D.F.
☎ 546-96-80 al 95.
Telex: 1772115 DUBHME.
Fax: 533-23-19.
Sr. James Dubin,
Presidente.
Sr. Edmundo Romero,
Director General.

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AIR CONDITIONING

CALEFACCION Y VENTILACION, S. A. de C.V.
D.G. Ing. Carlos Armella Maza
G.V. L.A.E. Sergio Armella Sánchez
Prolongación Calle 18 No. 245
Col. San Pedro de los Pinos
México, D. F.
Tel. 515-51-80 al 85
Proveedores de diseño, proyecto de instalación, ventas y mantenimiento de aire acondicionado.

•**ELIZONDO CARRIER, S. A.**
Ing. Alejandro Marti Ordóñez
Ruiz Cortines y Arista
Col. Vidriera
C.P. 064520
Monterrey, N.L.
Tel. 51-18-54 31-07-22 y 51-34-15
Of. En México
Av. Patriotismo No. 889, 7o. piso
Col. Mixcoac
C.P. 64780
Tel. 598-53-44 598-59-77 y 563-18-29
Fabricante de equipo de aire acondicionado.

FREYVEN DE MEXICO, S. A.
Lic. Carlos Belden
Moras 613-A, 103
Col. del Valle
México 03100, D. F.
Tel. 5-24-62-97
Aire acondicionado.

YORK RECOLD, S. A. de C.V.
YORK AIRE, S. A.
Judith Anguiano
Carretera Miguel Alemán-México
Km. 11.2
Monterrey, N. L.
Tel. 5-66-50-88
Aire acondicionado y refrigeración.

FOOD AND DRINK

ALIMENTOS FINDUS, S. A.
Srita. Olivia Espinoza
Joselillo No. 3
El Parque, Naucalpan
Edo. de México
Tel. 5-57-60-00
Helados Bambino

•**CAFETERIA LAUTREC**
Sr. Armando Moret
Calz. Tulyehualco No. 4155-3
México 09880, D. F.
Tel. 582-66-24 y 581-40-52
Productos químicos y alimenticios deshidratados, Idsa, Suppe, Mediterráneo, Sahara, Benedik y Lautrec (sustituto de crema en polvo en porciones individuales de 4 grs.)

•ASOCIADO A ABASTECEDORES TURISTICOS, A.C.

CLEMENTE JACQUES Y CIA., S. A. de C.V.
Srita. Graciela Ugalde
Oriente 239 letra "D" No. 43
Col. Agrícola Oriental
México, D. F. Tel. 558-19-99
Productos alimenticios de conserva.

DETREVI, S. A. de C.V.
Sr. Eduardo Zetina
Calle San Marcos Lote 3, Manz. 19
Col. Molino de Sto. Domingo
México, D. F.
Tel. 271-72-10
Fabricantes de los productos Tía Tula, mermeladas, cacahuates y nuez garapiñada.

***DILOX, S. A. de C.V.**
Sr. Jorge Porras
Norte No. 79-A, No. 235-D
Col. Nueva Clavería
México 02050, D. F.
Tel. 398-48-44
Fabricantes de porciones individuales (azúcar, mermelada, sal, pimienta, catsup, salsa picante, mostaza, palillos, crema en polvo para café, popotes y agitadores para cocktail) con impresión del logotipo de su hotel, línea aérea, restaurante, hospital, etc.

INDUSTRIAS COR, S. A.
Miguel Guzmán
Calle de los Maestros No. 127
México, D. F.
Tel. 597-48-16
Productos Alimenticios.

***LABORATORIOS GRIFFITH DE MEXICO, S. A. de C.V.**
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Ing. Eugenio F. Torres Aristi
James Watt No. 22
Zona Ind. Cuamatla
Izcalli, Edo. de México
C.P. 54800
Tels. 872-39-30 872-39-69 y 872-39-99
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Tels. 254-11-44 250-79-58 y 250-87-39
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D.G. Lic. Ernesto Ochoa Méndez
Insurgentes Sur No. 1510
México, D. F. Tel. 534-66-62
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7o. piso Col. Granada
México, D. F.
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México 04100, D. F.
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Col. Sta. María Insurgentes
México 06430, D. F.
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PROVEEDORA CHANTILLI, S. A. de C.V.
Ing. Fernando Bun Abad
Chicle No. 255
México 08400, D. F.
Tels. 657-05-40 y 657-01-12
Crema Chantilli para repostería.

SEAGRAM'S, S. A. de C.V.
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Lago Victoria No. 74, 4 piso
México 11520, D. F.
Tel. 531-06-44
Vinos, Whisky escoses, americano, canadiense, ron y vodka.

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Schiller No. 417 Col. Polanco
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G.G. Sr. Víctor Humberto García
Florentino Valdez No. 86
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Proveedora de equipo para restaurantes.

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Col. Pascual Ortiz de Ayala
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Andrés Molina Enrique 798
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Lázaro Cárdenas 305 P.B.
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México 06780, D. F.
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México 03020, D. F.
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OSRAM, S.A. de C.V.
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